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1996: Moving Closer to Clarity Through Dialog

by Lynne Branche Brown (Chief Operating Officer, Yankee Book Peddler, Inc.) <lcb@ubp.com>

At Yankee Book Peddler 1996 both began and ended with two library consortia asking our help in identifying and achieving operational efficiencies by combining their individual strengths with the strengths of their vendor. As 1996 started, the directors of the New England Land Grant institutions were meeting to discuss standardizing their technical services requirements and were seeking vendor support for supplying catalog records and physically processed books to these institutions as if they were a single entity. As 1996 ended, the directors of a Rhode Island consortium were meeting together, seeking similar efficiencies for their group of libraries in a coordinated outsourcing solution. At YBP, we see evidence in these events that library directors remain committed to seeking ways to "do more with less" by streamlining their technical services processes. Resources freed in technical services are being transferred to public services, in order to support the increased demand on the public service areas of their institutions. This focus on streamlining technical services was also in evidence throughout 1996 in the RFPs that we received. During 1996, YBP saw RFPs that asked us to: • perform library fund accounting (store and monitor encumbrances as well as expenditures by fund); • maintain the library's "on-order" file; • design and oversee the entire acquisitions and technical services function.

Libraries weren't the only ones focused on forming partnerships to gain operational advantages. This past year was also filled with vendors seeking to form alliances with each other. Like libraries, book vendors and bibliographic utilities, periodical

cal vendors and document delivery companies, and other groups of database providers joined forces to offer libraries a more complete package or a "total solution" to their information, acquisitions, and technical services' needs.

In addition to this focus on partnering, 1996 was also interspersed with: • periodical vendors and publishers exploring mechanisms for "profiling" their products in the manner of book approval plans; • the growth of the Web as a research tool (for libraries and vendors alike) • a huge growth in demand for the processing of books prior to shipment and the provision of electronic records for books purchased; • libraries increasingly willing to forego local cataloging or processing practices for the cost savings of vendor-provided services.

At this year's **Charleston Conference**, the focus seemed to be on the growth of information available in electronic formats — and what this growth means to those of us whose responsibility it will be to integrate this new medium into our existing collections and collecting processes. Numerous speakers at this conference talked about their desire to provide structure to this new medium, using tools familiar to us. One collection development librarian encouraged the vendors in the room to sell him organized access to new World Wide Web pages, offering to spend significant amounts of money with anyone willing to take on this daunting task. A scientific publisher described their plans to organize the electronic journals they make available by creating a "profile" for their electronic journal customers. Others

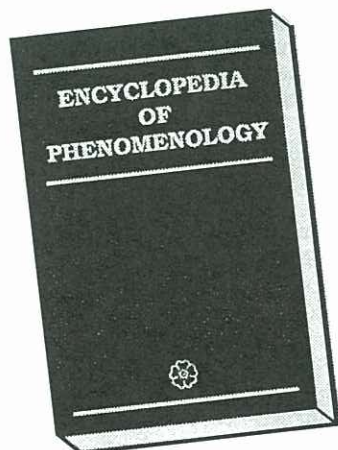
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described their desire for, or attempts at, providing their customers with ways to "profile" the materials available, in order to quantify and "collect" electronic media much like an approval plan profile quantifies and directs the book vendor in the supply of new printed material.

Throughout this year, library administrators, acquisitions librarians, and catalogers seem to have reached a higher level of comfort with vendor-provided technical services. As the year wore on, discussions that YBP had with libraries who were moving to outsourced cataloging and processing bore evidence to the fact that technical service librarians were willing to eliminate some of the local practices in their cataloging operation in order to outsource it to their vendor. As we began providing cataloging and processing services to libraries, the "Approval Plan" at one library began to be referred to as the "Selection Plan," as they recognized that the nature of the service had changed with processed books becoming non-returnable. While most librarians involved in establishing shelf-ready specifications have recognized that the cost of accepting books that would have been returned is compensated for in the benefits gained from outsourcing, this essential change in the nature of the service has left many library bibliographers and selectors concerned that it will hamper their ability to develop quality library collections. Over the next year we expect to see more selectors reach the same level of confidence and comfort in the vendor's ability to understand the needs of the library, to seek out those materials that meet those needs, and to prepare them for the patrons of the library in a manner equal to that done within the institution itself.

Where has the technical services agenda gone this year? As library interest in outsourcing their technical services operations

continued to grow, at YBP we had numerous conversations with many institutions, established technical services profiles and began providing new publications shelf-ready to libraries at over a dozen institutions. As we talked to customers, we found that libraries can mean many different things when they consider outsourcing. This year has been one of increasing clarity on everyone's part. Libraries seem to be more clear about what they are trying to accomplish; vendors have become more clear about how their services meet those needs.

At YBP we've developed fuller product definition for the electronic records we provide. Early in 1996 we engaged in extensive dialogs with customers to help both us and them understand the purposes to which "catalog" records are put. We identified many different roles these database records play in libraries. In the initial acquisitions phase, they serve as place holders — to alert staff (and at some institutions, patrons) that an item is on order and will be added to the collection upon arrival. As a place holder, the record must provide sufficient bibliographic access to allow a user to recognize the item that has been ordered, but does not need to contain the full scope of information necessary when the item becomes part of the collection.

Upon receipt of the published work, libraries require a more complete catalog record — both in format and content. Typically these records must either originate from the Library of Congress, or adhere to current LC cataloging rules, and be delivered in standard USMARC format. For most institutions, these records provide improved access points, but continue to act as "place holders" until a full record is retrieved from a bibliographic utility. In some institutions, these records are also used to perform searches against the records in a bibliographic utility for record retrieval. Ultimately, a full MARC record replaces the acquisitions-level "place holder," serving as a permanent record in the database, and providing full access to the item for patrons of the library.

Toward the end of 1996 we started (finally!) to overcome the long-agonized issue of double-keying orders into both local systems and vendor systems. Working with Innovative Interfaces and our mutual customers, YBP helped design a creative file transfer solution that will allow an Innovative library to key orders into our online system, and let file transfers provided by us to the library create the required records in the Innovative system. This is just one example of the many developments we saw across the technology front in 1996. After many years of talking about EDI and the benefits to be gained when library systems and vendors systems can all "do EDI," 1996 moved us all closer to making that a reality. GOBILink allows both YBP and our library customers to realize improved productivity through the electronic transfer of data.

Throughout the year YBP also routinely transmitted PromptCat data to OCLC using standard X12 transaction sets, putting EDI into standard production in this data transmission effort. We also developed specifications with a number of clients for transmitting invoice data from YBP to the library using other standard X12 transaction sets. While YBP has exchanged data with libraries for years, it has been done by developing client-specific file transfer specifications. Developments realized in 1996 have brought libraries and vendors alike closer to an "operationalized" exchange of data.

Charles Handy's writings are favorite discussion topics at YBP. In *The Age of Paradox* (Harvard Business School Press, 1994) he writes, "If we are to cope with the turbulence of life today, we must start by organizing it in our minds. Until we do, we will feel impotent, victims of events beyond our control or even our capacity to understand. Framing the confusion is the first step to doing something about it." Dialog between and among many of the groups involved in scholarly communications began, in earnest, in 1995/1996. We look forward to working even more closely with those involved in this enterprise as we begin to get past these confusions and begin to pursue opportunities.

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